How to Transfer Members to a New Class

Actions · https://a2bmanager.com/docs/transfer-a-member-to-a-new-class/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/transfer-a-member-to-a-new-class-walkthrough.mp4

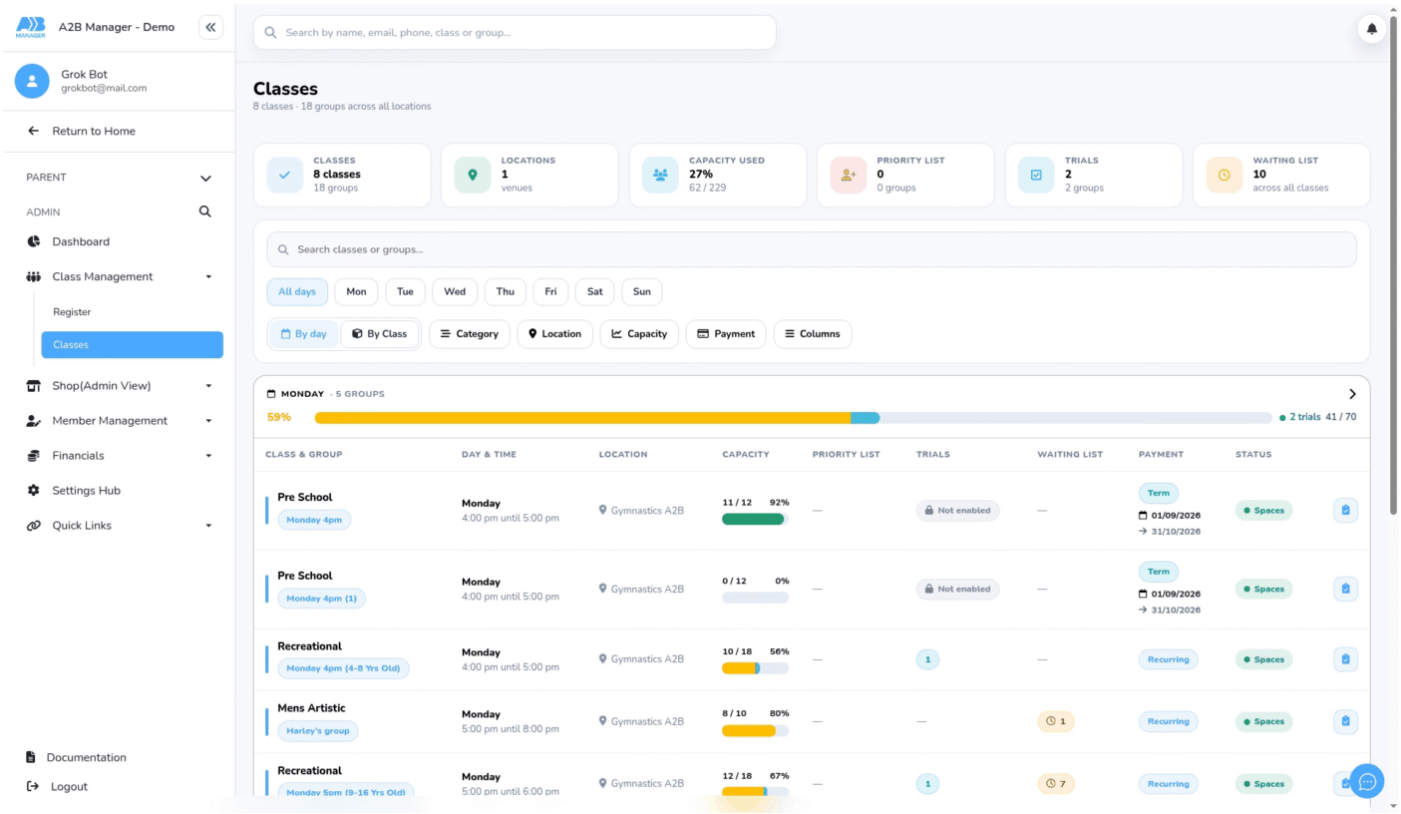
Video walkthrough: transferring a member from the Classes page and from their profile

A transfer moves one or more members from their current group into a new group. You choose their last lesson in the current group and the date they start in the new one, and A2B Manager updates both groups for you. It's useful when a child moves up a level, changes day, or needs a different time slot.

Transferring members

Step 1: Open the group (0:00)

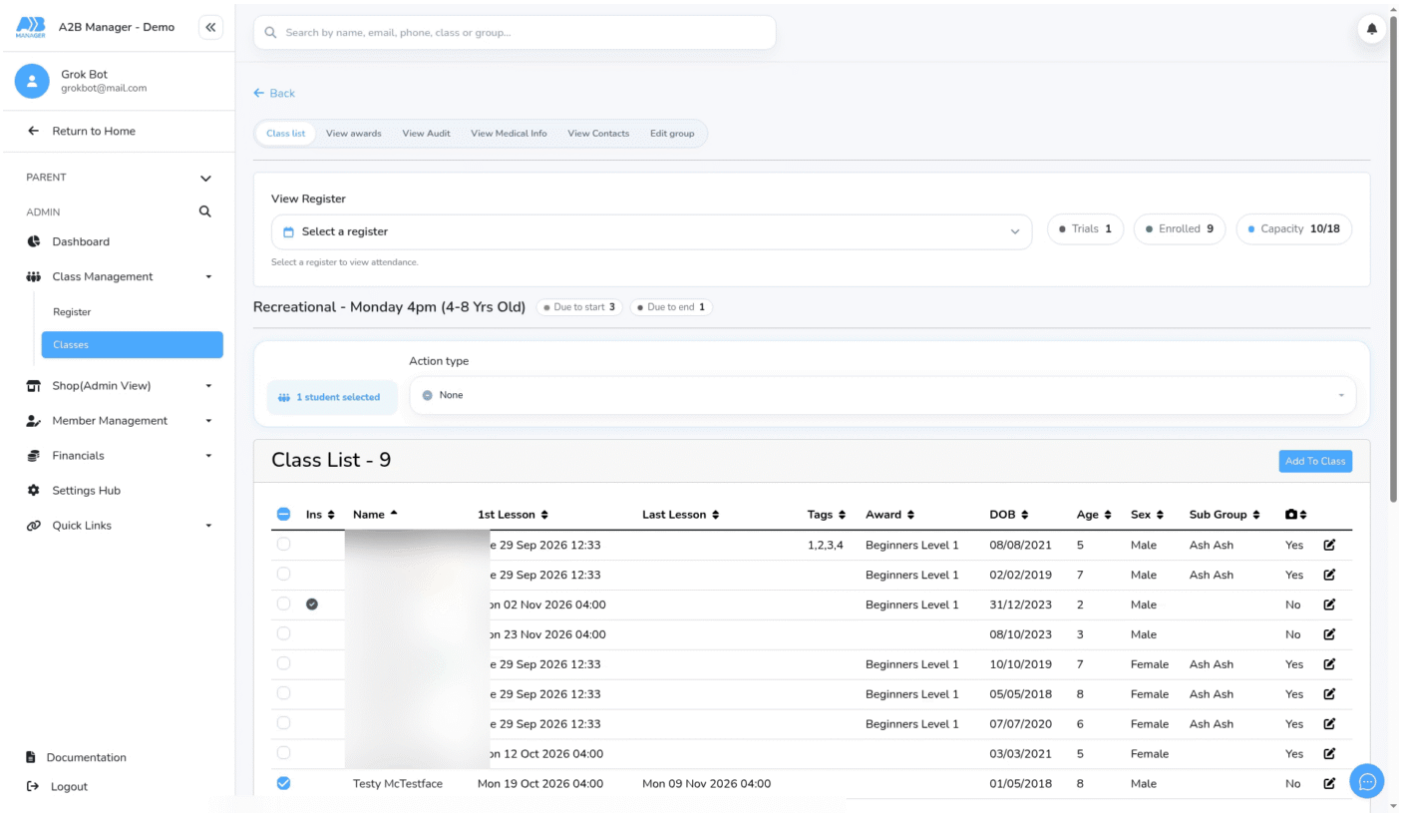
- You can start a transfer from two places: the group's class list on the **Classes** page (steps 1 to 7), or the member's profile (step 8). Both open the same **Transfer Members** window.
- In the left-hand menu, open **Class Management** and click **Classes**.
- Click the group the member is leaving, for example *Recreational, Monday 4pm*. The group's **Class List** opens.



Step 1: The Classes page

Step 2: Tick the members (0:15)

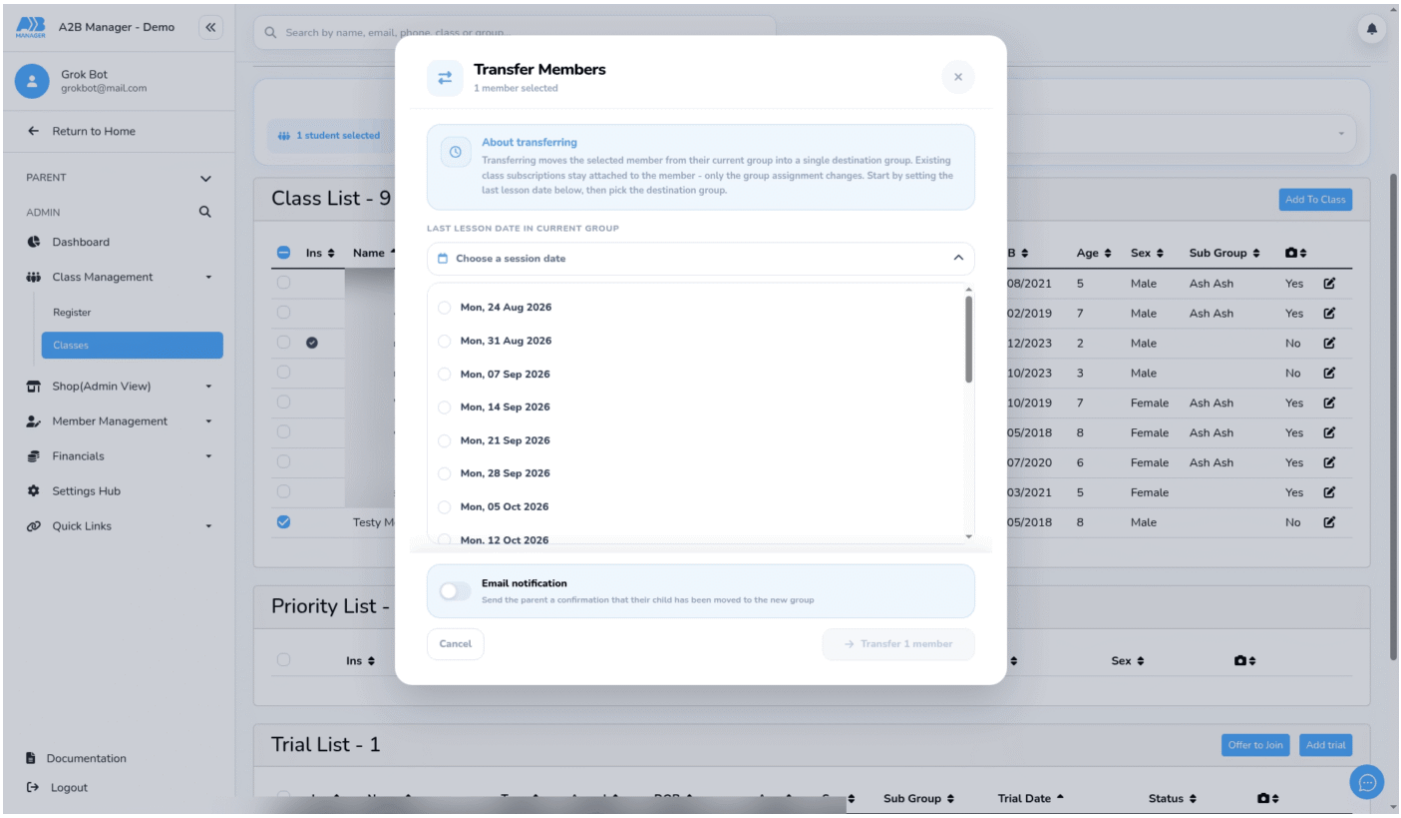
- In the **Class List**, tick the member you want to move. You can tick several members to move them together.
- The bar above the list shows how many are selected, for example *1 student selected*.



Step 2: One member ticked

Step 3: Choose Member Transfer (0:23)

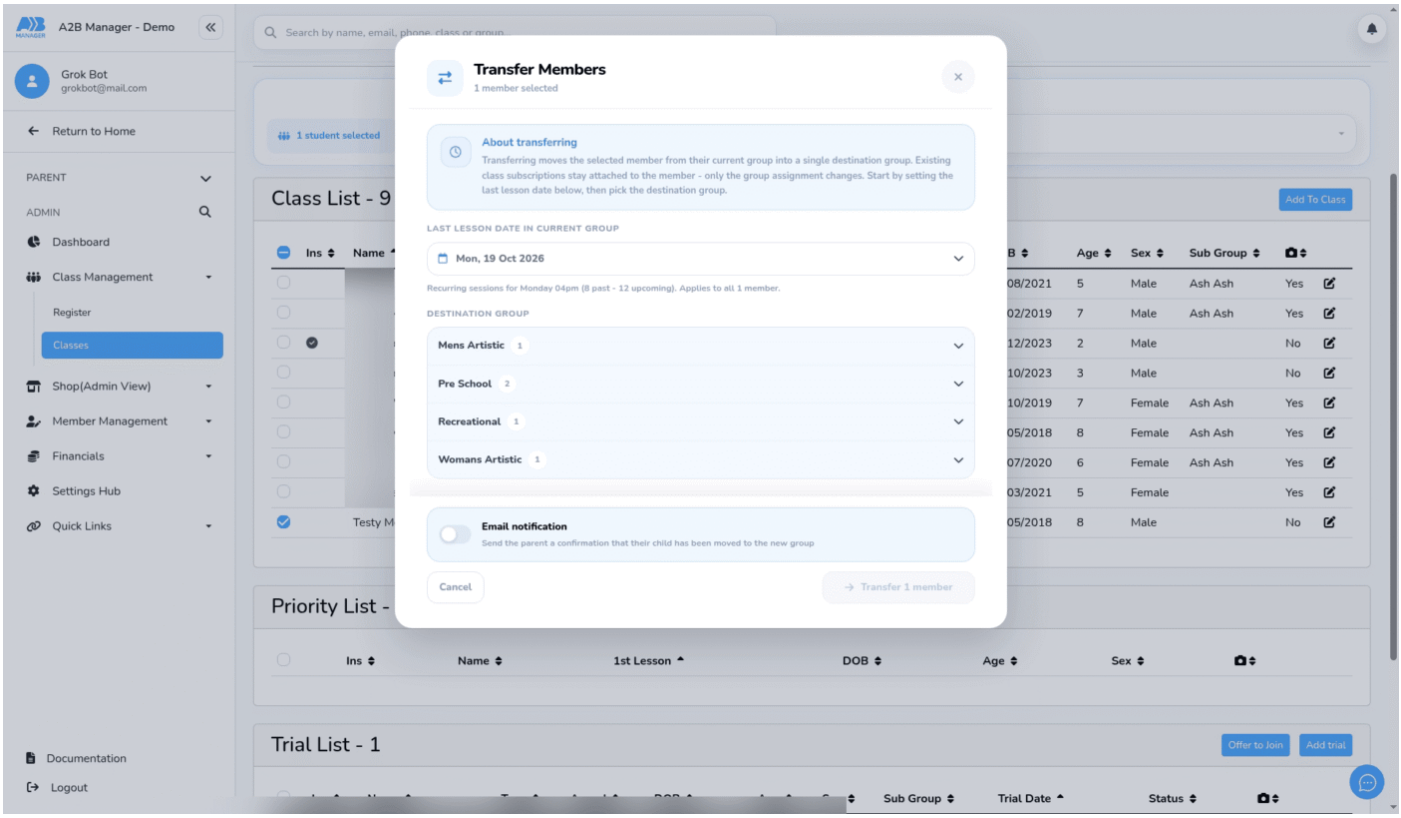
- Open **Action type** and choose **Member Transfer**.
- The **Transfer Members** window opens.



Step 3: The Transfer Members window

Step 4: Pick the last lesson date (0:33)

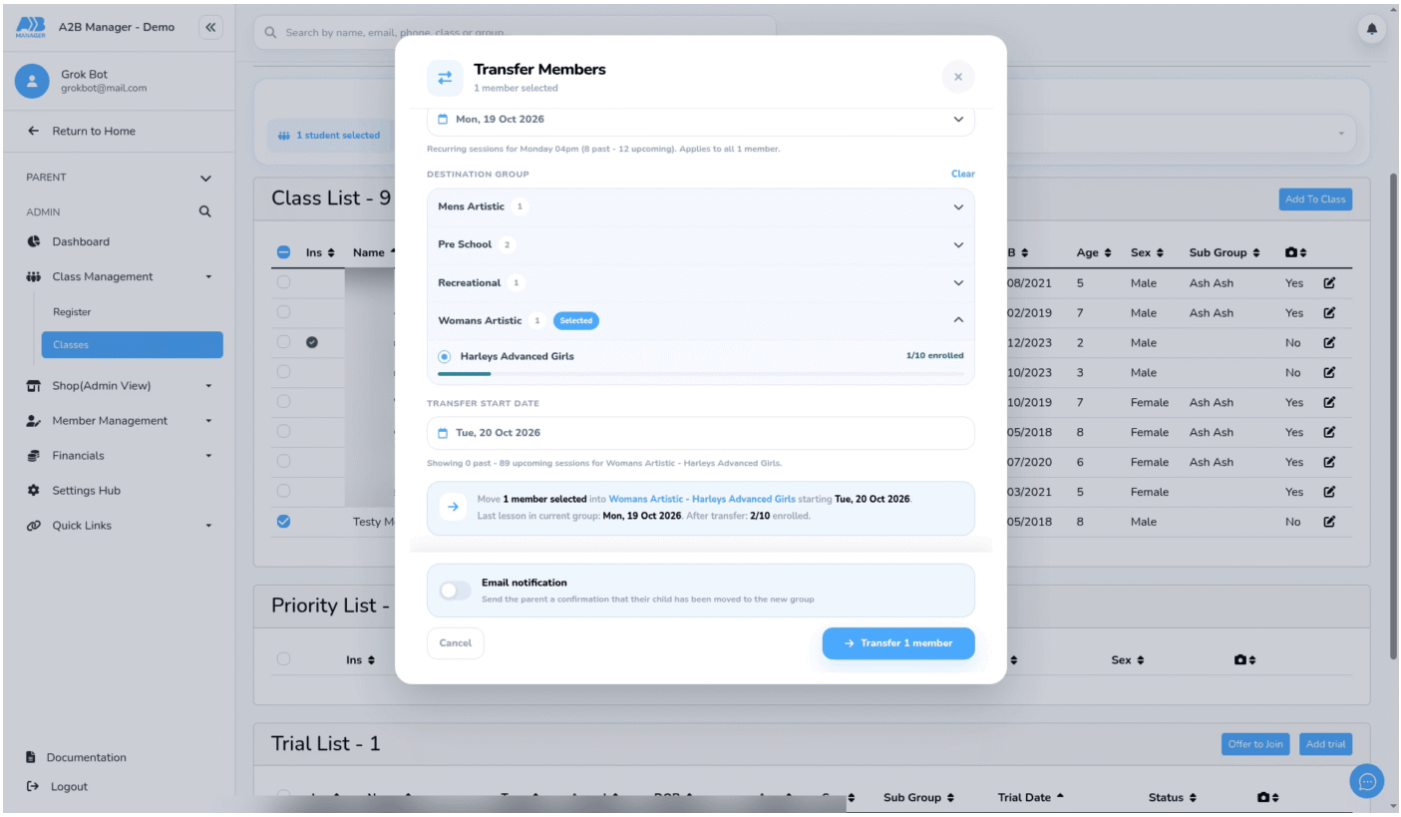
- Open **Last lesson date in current group** and pick the member's final session in this group.
- Always pick an upcoming date. The list also shows past sessions, so check you've picked one under **Upcoming sessions**.



Step 4: Picking the last lesson date

Step 5: Choose the destination group (0:46)

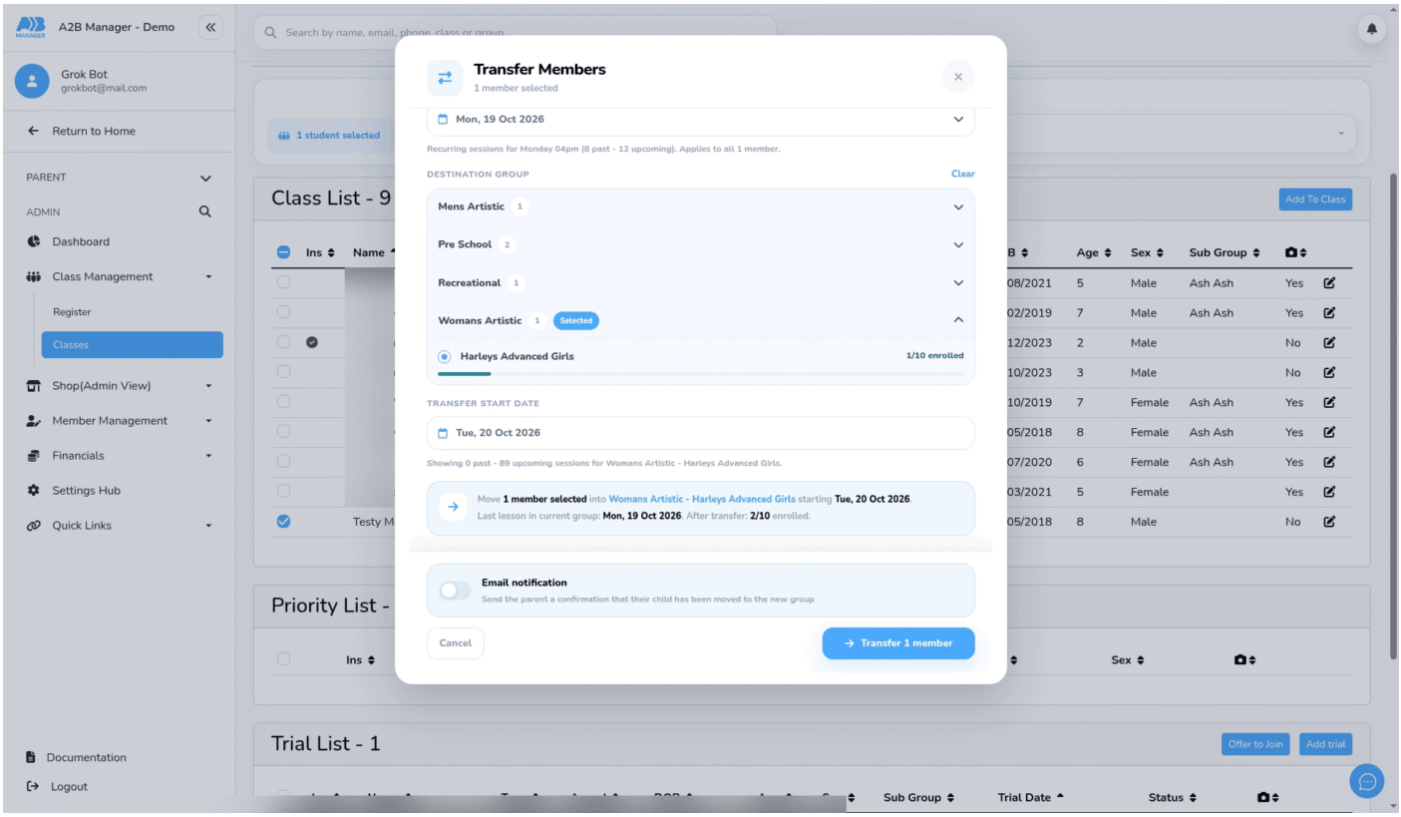
- Under **Destination group**, expand the class and click the new group.
- The bar under each group shows how many places are taken, for example *1/10 enrolled*.
- Multi-event and pay-as-you-go (PAYG) groups can't currently be chosen as destinations.



Step 5: Choosing the destination group

Step 6: Check the start date and summary (0:58)

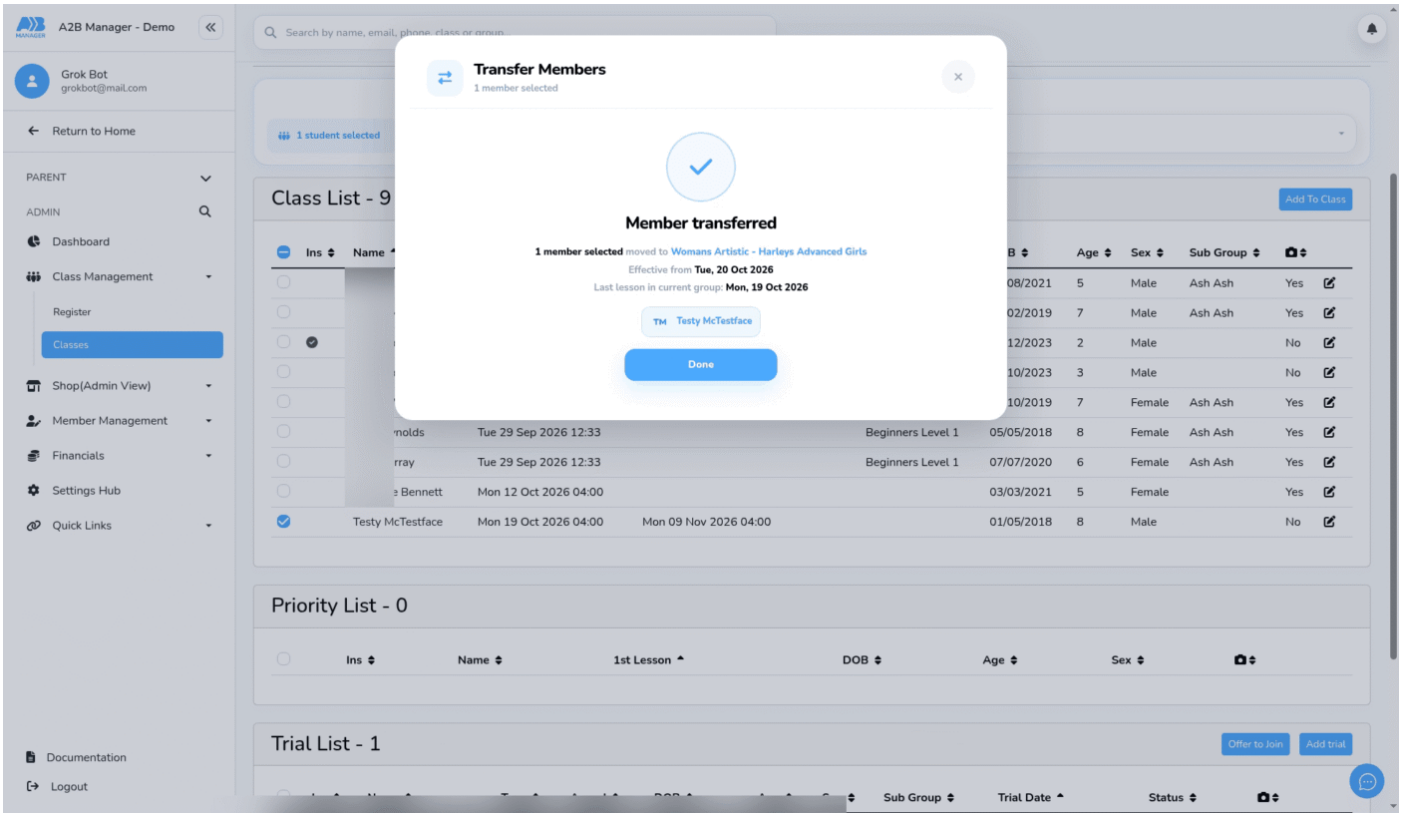
- **Transfer start date** defaults to the first session after the last lesson date. Change it if you need to, but pick an upcoming date.
- The summary shows who is moving, the new group, the start date and the last lesson in the current group. Check it carefully.
- Leave **Email notification** off unless you've already edited the Move To Class email wording (see *Emailing parents* below).



Step 6: The summary, with Email notification off

Step 7: Transfer and confirm (1:10)

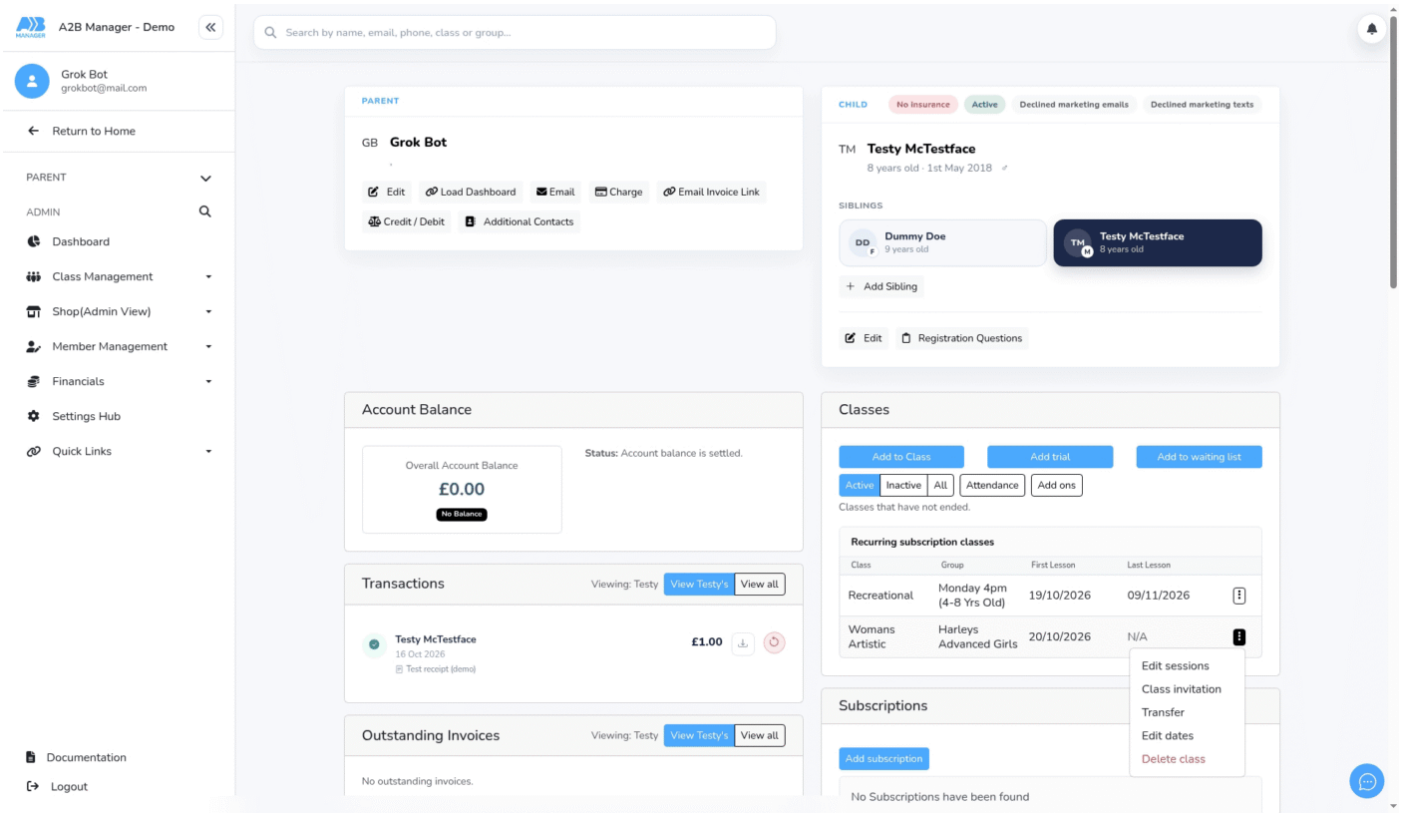
- Click **Transfer 1 member** (the button shows how many members you've selected).
- **Member transferred** confirms the new group, the date it takes effect and the last lesson in the current group. Click **Done**.



Step 7: Member transferred

Step 8: Or start from the member's profile (1:21)

- Open the member's profile. In the **Classes** section, click the menu on the class row you want to move them from.
- Choose **Transfer**. The same **Transfer Members** window opens for that member, so follow steps 4 to 7.



Step 8: Transfer in the class row menu on a member's profile

Billing

- A transfer doesn't change billing. The member's existing subscription carries on at the same price.
- If the new group costs a different amount, change the subscription separately in **Subscription management**.

Emailing parents

- Ticking **Email notification** sends each parent the **Move To Class** email template.
- The same template is also sent when you move a child off a priority list, and its default wording talks about the priority list. Before you tick the email option on a transfer, edit the template's wording so it makes sense for both.

Good to know

- Use upcoming dates only, for both the last lesson date and the transfer start date.
- Multi-event and PAYG groups can't currently be destinations.
- If the member was on a waiting list for the new group, or for other groups in the same class, they're taken off it.

- There's no undo. To reverse a transfer, transfer the member back.

> **Tip:** Moving a whole group up a level? Tick all the members who are moving and transfer them in one go.

FAQs

- **Can I move more than one member at once?** Yes. Tick them all in the group's class list before choosing **Member Transfer**.
- **Does the price change?** No. Change the subscription in **Subscription management** if the new group costs a different amount.
- **Are parents told?** Only if you tick **Email notification**. Edit the Move To Class template wording first.
- **Can I undo a transfer?** Not directly. Transfer the member back to their original group instead.

Download the PDF guide (optional)